

Albanian TV programming on the eve of the switch over to digital terrestrial broadcasting

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Abstract

The paper addresses the television programs' production and analyzes this content for national coverage television stations in Albania. Television programming in Albania has moved quickly toward quantitative and qualitative growth over a period of 10 years, but is still dominated by top-down perspective look at the audience, which remains mostly a passive one. Television stations, mostly imitate each other in their program structures and strategies. The paper gives statistical data of 2013 for three national coverage television stations of the different TV genres.

The paper sets the focus on the development of Albanian TV market at the point of transition to digital terrestrial television broadcasting, as the deadline is set for mid June 2015.

Television management, as a specific form of business management, presents some of its characteristics through program percentage occupied by each of the television genres in the structure of TV programming. The "economy of television", figures and numbers of advertisement revenues and audience seems to take priority over television programming, and this is also present in Albania nowadays on the verge of a digital terrestrial TV broadcasting. The Sustainable Development Index for the media industry and also the effect of business management factor in Albania are presented in the paper.

Keywords: *television, programming, management, digital broadcasting, media sustainability index.*

On the eve of digital broadcasting switch over, set for mid June 2015, while there is still no license issued for the already broadcasting digital platforms, the primarily attention of the TV operators, analyst

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and the regulator Audiovisual Media Authority (AMA) is drawn by the technology of the broadcasting platforms, the attention of television operators, analysts and regulatory Audiovisual Media Authority (AMA). Public sensitivity is quite low on the way how the programming obligations will be met by those platforms, filling with programs and content. It seems as this is left to the goodwill and gradual development of media operators.

The digital television switch over consists not only of the use of new technologies for distributing the "old" content. The importance of content production, serving to interactive audience, it is also related to new methods of content production and media business models to be followed by media companies. The importance of the program content broadcasted on these TV platforms is also demonstrated by a survey that one of digital platform has undertaken with its own subscribers resulting that over 53% of its customers had as the first reason to the subscription, the programming offered through this platform.¹

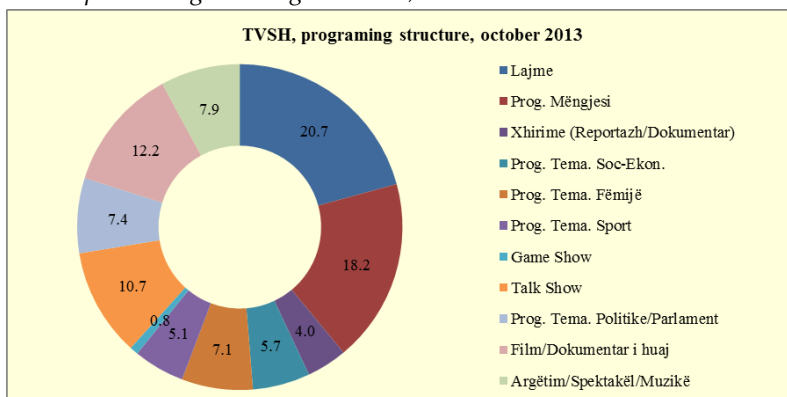
Current Programming TV

Through the calculation of the TV programming for the national coverage TV station in Albania, there are different reports between TV genres of program productions, which set out the profile of each of them.²

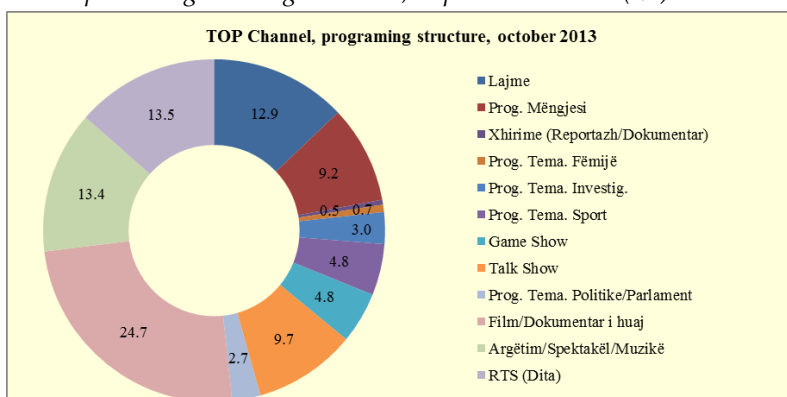
¹ Eglinor Ramaj, "Digital: background, penetration in the market, advantages and disadvantages" in *Studime Albanologjike, Mediatizimi i historisë dhe historia e medias*. Publishing Coordinator AK.Prof.Dr. Artan Fuga (Tiranë: Universiteti i Tiranës, Departamenti i gazetarisë dhe komunikimit, 2012), 509-515.

² The calculation of TV program percentage for each of TV genres is done by the author, based on the programming schedule, explanation at the end notes.

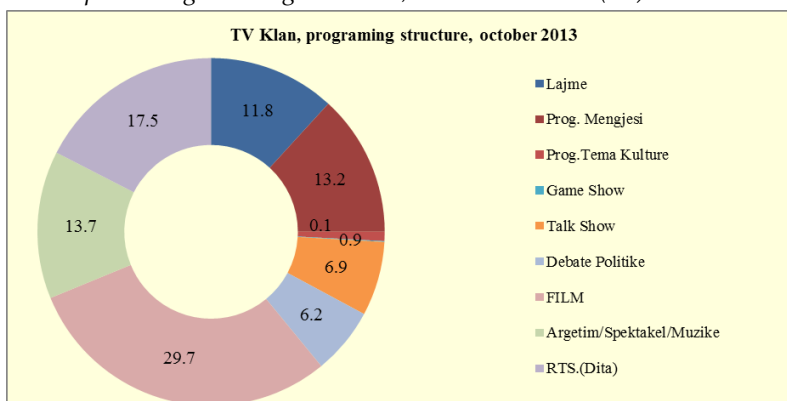
Graph 1: Programming structure, TVSH 2013



Graph 2: Programming structure, Top Channel 2013 (%)

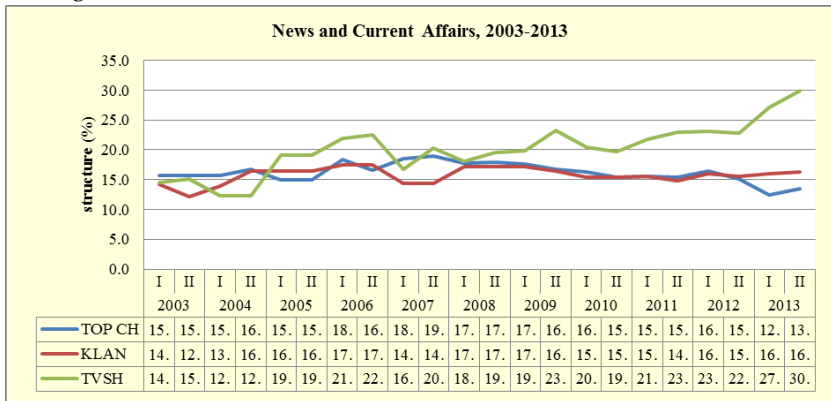


Graph 3: Programming structure, KLAN TV 2013 (%)



A TV station in Albania with a generalist's profile, have characteristics reports and percentage of different genres of TV programming. Those percentages have varied from year to year. The graph below compares the times series of 2003-2013 for Albanian public television TVSH, TV Klan and Top Channel for percentages of News and Current Affairs combined together (including all political debates and parliamentary session).

Graph 4: Dynamics of "News and Current Affairs" in the national coverage TV station in Albania, 2003-2013 (%)



The above indicators are an average calculation based on the programming schedule for a week in March and October, for these televisions, reflecting the development trends over the years, for only these two types of programs. These percentages do not take into calculation the election campaign periods. During those periods of time, from the local government elections as well as parliamentary ones, programming schedule of national coverage television varies adding to their programs prime time political debates almost every evening.

The chart for News programs and Current Affairs News shows an increase of the programs of this nature, which for Public Television, TVSH, have almost doubled its percentage over a 11-year period. This situation was almost similar during 2014 and the first quarter of 2015.

Annual Report, National Council of Radio and Television (former KKRT and now Audiovisual Media Authority, AMA) for 2011 expressed the problem of disproportion between TV time allocated to different genres and topics in TV coverage, present also at the TV programming of the public television TVSH. In a more precise way, the NCRT express concern for the time allocated to children's programs.

[...] There is no need for "subversion" or innovation in the structure of national television program operators, but for a more responsible approach, for a further appreciation of the need of the increasingly high quality of direct programming for children, that should be part of the programming schedule. This becomes more evident as the main part in programming for children is still occupied by animated films, often repeated in multiple rebroadcast, old and seen, that do not attract interest of the children of different age groups who have seen them year after year, from one TV channel to the other."³

In such a situation for national coverage TV channels is to develop the process of the digital switch over television broadcasting.

The performance of digital broadcasting in Albania

Digital television broadcasting platforms began broadcasting in an unprepared regulatory environment, lacking a licensing framework for these transmission formats.

First digital platforms in Albania "DIGITALB" stated its broadcasting in July 2004. "DIGITALB" began its terrestrial broadcasts, covering mainly cities of the Central and Western area of the country. In December 2004 this platform began broadcasting via EutelSat satellite covering the entire territory of the Balkans and most of Europe, where most of the Albanian language speaking population is located outside of national borders. This platform introduced a

³ National Council of Radio and Televizion, 2012 "Annual Report of activities for year 2011" page 21 seen on Internet page www.kkrt.gov.al on 15 October 2014

whole new series of broadcasting programs representing almost all age groups of audience and a variety of television genres.

In 2006, the Albanian media landscape was enriched with another digital satellite platform "SuperSport" which had programs solely dedicated to sports activities 2006.⁴

In 2006, in its Annual Report, the National Council of Radio and Television assessed the situation of digital terrestrial platforms as such:

"[...] recently, "Sat +" and "Digitalb", etc. have emerged in satellite broadcasting without the permission of the NCRT. The NCRT has failed to license them because of legal barriers already identified concerning the ownership of networks (satellite operators by law are considered as national operators) and implications related to the new digital technology. Meanwhile, as a result of fierce competition in the market already set up, in 2006, "Sat +" has stopped operating⁵.

In 2008, another broadcasting digital platform start broadcasting called "Tring", with the aim of offering Hi-Speed Internet, phone service and digital TV. "Tring" since 2008 has built a digital terrestrial system, two fixed networks. Broadcasting of "Tring" first started on 23.01.2008 based on the decision of the National Council of Radio and Television that gave temporary permission "For experimentation of digital broadcasting ". Temporary permission due day expired on 24.07.2008 and "Tring" is already licensed as a satellite digital operator.

In the digital terrestrial system, "Shijak TV" built a fixed network, which uses UHF channel 24 via a transmitter station installed on Dajti Mountain, covering Tirana-Durres area. NCRT gave a temporary permit "For experimentation of digital broadcasting" with the condition that, at the end of the deadline set by this permit, the operator shall submit to the NCRT detailed information on technical and economic results of the experimentation as well as the relevant conclusions. "This task is not implemented from "Shijak TV" but, from

⁴ National Registration Centre, "Historic Extract for "Supersport sh.p.k."" seen on the Internet page www.qkr.gov.al on 20 February 2014.

⁵ National Council of Radio and Television, 2007 "Annual Report of activities for year 2006" seen on www.kkrt.gov.al on 15 October 2014.

records held by NCRT, it turns out that "[...] the experiment has not achieved the intended technical and economic results."⁶

Licensing of digital platforms

In its report of 2011, the NCRT called the situation of the terrestrial digital broadcasting "completely unregulated, and as a result uncontrolled". Terrestrial digital broadcasting operators continued operating without a proper license and with no financial liabilities. Efforts to formalize the digital market began in 2008 with the drafting of the "Digital Switch-over Strategy" for the transition to digital terrestrial broadcasting. Meanwhile, in news published in its web page the NCRT announced the beginning of the competition for entities applying for a license for operators' private national terrestrial digital network, for three allotments. The competition was expected to be done in November 2008. The file for that bid should have included along with the requirements for the legal registration of the applying subject, the application of technical and economic criteria.⁷

This competition did not evolve as anticipated in November 2008 and since that time, the NCRT continued to announce other deadlines on their web page, but a competition never happened. This situation remained unclear and often justified by technical reasons and some cases legal reasons as well.

The final Strategy for digital switch over lasted almost four years to be completed and approved. In May 2012 this Strategy was adopted by the decision of Council of Ministers no. 292, dated 02.05.2012. The Strategy, the Action Plan and the Law 97/2013 "On the audiovisual media in the Republic of Albania" postpone the transition to digital broadcasting for the final period of June 17, 2015.

⁶ National Council of Radio and Television, 2011 "Annual Report of activities for year 2011" seen on www.kkrt.gov.al on 15 October 2014.

⁷ National Council of Radio and Television 2008. "News on the organization of the open competition for private operators" parë më 09 shtator 2013 në http://www.ama.gov.al/index.php?option=com_content&view=article&id=112%3A1102008-njofitim-per-organizimin-e-konkurimit-te-kandidaturave-per-operatore-private&Itemid=77&lang=sq

On July 2, 2013 AMA (AMA, former NCRT) reopened the competition for the licensing of private digital television operators. Pursuant to Article 139 of this law, the AMA had the legal obligation within three months from the entry into force of the law (i.e. not later than July 5, 2013), to make a public notice inviting private operators and national historical and existing operators with experience in digital broadcasting, to participate in the selection procedure for national digital networks, according to the Beauty Contest'.

The licensing issue later went on the court system as the TV operators opposed the legitimacy of Audiovisual Media Authority, which, according to them, and based on the legal changes had to be reformed and the mandate of the President of the AMA (former NCRT) was completed. On July 31, 2013, the Court of Tirana decided to accept the request made on 22 July of that year by the three operators "Digitalb", "Top Channel" and Media 6 vs. Audiovisual Media Authority (AMA). This meant that while the court decides, the AMA will suspend the process started for the licensing of digital network operators'. The court considered as no valid the AMA's administrative acts of July 2, 2013, with invitations to start the process of licensing under the principle "beauty contest". The essence of the appeal of complains from those TV stations was that there was no quorum necessary to initiate such proceedings. Also, claims were related to other preliminary preparations need to be made earlier and more detailed consultation with stakeholders needed before such important decisions are taken. Meanwhile, over a year after the Parliamentary election and a lot of discussion at the Parliamentary Media Committee, the new head of AMA was elected.

Through news published on the web page on 16 April 2015 AMA announced the competition for the award of five private national licenses for digital broadcasting according to the Beauty Contest. AMA called for the submission of application bids for license through Beauty Contest these entities: Klan TV, Top Channel, Digit-Alb, Tring TV and Supersport. Applications opened on 27 May 2015, while the

only invited who did not send an application bid was Tring TV. The licensing process is still pending and no results.⁸

Use of the Internet in Albania

There is no data on how much local news is followed on the Internet web pages compared with how much of this local information is followed through traditional news sources as television. The increased scale of the Internet usage is yet another indicator showing the possibilities the television has to grow and increase the visibility among the audience.

Table 1: Internet usage in percentage to the population (%)

	2008	2009	2010	2011	2012	2013
Percentage of population using Internet	16.0	20.6	43.0	43.4	48.01	60.01

More detailed information is given through the Annual Reports of the Electronic Communications and Postal Authority (AEPC). At the end of December 2013, the number of 3G subscribers to broadband access and fixed telephony was 293,932. To this figure should be added the number of Internet users from mobile phone sets, which by the end of 2013 reached 1,119,892 broadband subscribers with access to 3G.

Table 2: Number of subscribers to broadband 3G access by mobile phone

	USB/Modem	Mobile Phone
2011	34,493	248,756
2012	55,405	594,308
2013	11,367	1,119,892

⁸ No results till end of June when this paper was written.

Sustainability Media Development (index)

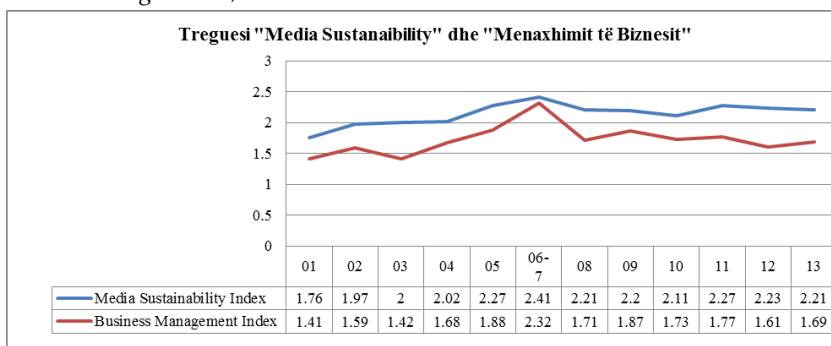
Analysing the progress of the media from the perspective of sustainable development, there are two indicators that could serve as a guide, "Sustainability Media Index" and "Business Management Index". Both indexes are calculated by IREX, a program developed by an international organization that describe and calculates these indicators of media development in many regions of the world.

The "Business Management Index" in the media, considers both print and electronic media. It examines whether: (i) Media outlets operate as efficient and self-sustaining enterprises; (ii) Media receive revenue from a multitude of sources; (iii) Advertising agencies and related industries support an advertising market. (iv) Advertising revenue as a percentage of total revenue is in line with accepted standards; (v) Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market; (vi) Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience; (vii) Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.⁹

It is important to look closely the performance of the Business Management Index compared with Media Sustainability Index and how it has developed through the years.

⁹ International Research and Exchange Organization. "Media Sustainability Index" Methodology. Seen on 15 March 2015 on <https://www.irex.org/sites/default/files/2015-msi-summary.pdf>

Graph 4: Dynamics of "Media Sustainability Index" and "Business Media management", 2001-2013



As seen from the graph, the indicator "Business Management" is always lower compared with the total index "Media Sustainability", which includes four other indicators, while the index of "Business Management Index" is always less than 210. The index, which summarizes together print and electronic media, helps create an overview on how media business is managed in Albania, according to the perception of the interviewed groups of analysts.

Conclusion:

The latest developments in the licensing of the digital private TV platform, the last deadline in digital switch over¹¹ and the extension of the deadline for another period would also bring changes in the media landscape in the country. The first signs of those changes are firstly seen in some of the local television whose programming structure has changed, giving almost rebroadcast of programs, and limiting the new production only to a talk show with guest in studio and in a press review of the day. In June 2015 "Koha TV" and "Planet TV" have no news programs in broadcasting schedule and all rerun programs, while the two others "Shijak TV" and "UTV News" have a

¹⁰ The maximum value of those Indicators is 4.

¹¹ Autoriteti i Mediave Audiovizive "Mbi mosrespektimin e afateve të procesit të digjitalizimit" (15 qershor 2015) parë në <http://ama.gov.al/preview/wp-content/uploads/2015/06/Njoftim-per-median-mbi-afatin-e-digjitalizimit.pdf>

higher percentage of rerun programs over 50% and only one talk show in the studio with guest talking on the daily topic. They have also cut the staff number.

The changes in the television industry landscape in Albania will be influenced as well by the lack of diversification of programs and imitation of programs, mostly those covering political issues that are based in the studio, the lack of competitive advantages in the programming schedule. This will influence the programming as well.

In the new digital time, the television business in Albania, besides the diversification of the program production, will need to adapt their business model to opportunities of finances in a shrinking advertisement market.

Reference:

Eglinor Ramaj, "Digital: background, penetration in the market, advantages and disadvantages" in *Studime Albanologjike, Mediatizimi i historisë dhe historia e medias*. Publishing coordinator AK. Prof. Dr. Artan Fuga (Tiranë: Universiteti i Tiranës, Journalism and Communication Department, 2012), 509-515.

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National Council of Radio and Television, Annual Report for year 2006, seen in www.kkrt.gov.al on 15 October 2013.

National Council of Radio and Television, Annual Report for year 2011, seen in www.kkrt.gov.al on 15 October 2013.

The programming schedule of TVSH 2013.

The programming schedule of Top Channel 2013.

The programming schedule of TV KLAN 2013.

Historic Extract of "Supersport" seen on the National Registration Center www.qkr.gov.al on 20 February 2014.

Digital Switch over Strategjia (2013) seen on 31 March 2015 on http://ama.gov.al/preview/wp-content/uploads/2015/03/9STRATEGJIA_E_KALIMIT_NGA_TRANSMETIMET_ANALOGE_NE_TRANSMETIMET_NUMERIKE.pdf

Audiovizual Media Authority. News "On the lost deadline for the digitalization process" (<http://ama.gov.al/preview/wp-content/uploads/2015/06/Njoftim-per-median-mpi-afatin-e-digitalizimit.pdf> seen in 15 June 2015).

International Research and Exchange Organization. "Media Sustainability Index", methodology seen on 15 March 2015 in <https://www.irex.org/sites/default/files/2015-msi-summary.pdf>

Note:

The study unit for the programming schedule is a week from 07:00-24:00. In this calculation the advertisement time is not taken in consideration and subtracted. In selection of the typical week for the calculation, was taken in consideration those weeks that present the normal week, taking off those casual factors. The TV station in general start their season of new programs at the end of September and October. For this reason, studying the programming schedule was studying a week in October (second or the third week of October). In order to create a balance with the changes that might happen in the programming schedule, with the beginning of the calendar year, another week in March was taken into calculation.

The broadcasting time was divided in categories based in the classification of the foreign literature and the studies of the Albanian researchers "Gazetaria 2" Hamit Boriçi. The categories of the programming are also based in the topics of the program is dealing with and the program is done in the studio or outside shooting, reportage.

Categories are:

News; Morning Show; Reportage/Documentary; Programs with Social-Economic topics, in studio; Programs for children; Investigative Programs; Programs of Education/Culture/History topics in studio; Reality Show; Sport Programs; Game Show; Talk Show, in studio; Studio debate on Politics/Parliament; Film/Foreign Documentaries; Entertainment/Spectacles/Music; Rerun during the day (07:00-24:00).

Broadcasting schedule of TVSH are seen on 27 January-3 February and 17-23 November 2003; 16-22 February 2004; 31-6 November 2005;

6-13 February and 30 October-6 November 2006; 19-25 February and 22-28 October 2007; 18 -25 February and 15-21 shtator 2008; 22-28 February and 21-28 shtator 2009; 8-14 February and 22-28 November 2010; 21-27 mars and 24-31 October 2011; 5-12 mars and 22-28 October 2012; 18-24 March and 21-27 October 2013.

Broadcasting schedule of TVKLAN are seen on 12-19 maj and 13- 0 October 2002; 9-16 March and 12-19 October; 15-22 March and 8-15 October 2004; 27 March-8 April and 31-6 November 2005; 13-19 March 2006; 9-15 April 2007; 17-23 October 2008; 16-22 March and 30 November-6 dhjetor 2009; 29 March-4 April and 22-28 November 2010; 21-27 March and 5-11 December 2011; 5-12 March and 22-28 October 2012; 18-24 March 2013.

Broadcasting schedule of Top Channel are seen on 8-15 October 2004; 28 March-8 April and 31 October-6 November 2005; 13-19 March and 30 October-6 November 2006; 19-25 March and 22-30 October 2007; 17-24 March and 17-23 November 2008; 16-22 March and 23-30 November 2009; 29 March-4 April and 22-28 November 2010; 21-27 March and 24-31 October 2011; 5-12 March and 22-28 October 2012; 18-24 March and 21-28 October 2013.

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Graph 5 Dynamics of "Media Sustainability Index" and "Business Media management", 2001-2013 (në %)